



Retirement Systems Modernization

Working for America

UNITED STATES OFFICE OF PERSONNEL MANAGEMENT



Message from the President

“When you’re still writing records down by hand and sharing information through files, it’s not exactly a modern system.”

- George W. Bush



Message from the Director



“Modernization is a strategic effort to continue providing retirement services that meet our customer’s expectations of timely and responsive service and the American people’s expectations of accessible, efficient, and cost-effective Government.”

- Kay Coles James

Agenda

- **Retirement System Modernization Overview**
- **Coverage Determination Application (CDA) Overview**
- **CDA Demonstration**
- **What's Next?**
- **Contact Information**
- **Questions**



Retirement Systems Modernization (RSM)

The future of the Federal Retirement System

- **RSM**

- Is OPM's strategic initiative to modernize the administration of the Federal retirement systems, improving service through **state-of-the-art technology** and **world-class business processes**.
- Is supported by important partner groups including:
 - **The Agency Advisory Committee** (DoD, OPM, USPS, USDA and DOL)
 - **OMB** and **GAO**
 - **OPM's Executive Steering Committee**
 - Federal Retirement Systems and Process **Experts and Managers**
- Aims to provide Agencies, Federal employees, and annuitants many benefits including:
 - Better **customer service, benefits decisions and counseling**
 - New online tools and paperless processes for greater **efficiency and convenience**
 - Improved **timeliness and accuracy** of retirement deductions and payments



RSM and the Coverage Determination Application (CDA)

From a vision...to a reality

- RSM's multi-phase strategy includes the transition to a paperless environment and the development of tools to improve the **efficiency and convenience** of Federal retirement systems.
- Recent legislation (e.g., FERCCA) highlighted the critical need for improved retirement coverage decisions.
- The Agency Advisory Committee placed the highest priority on providing a more accurate and consistent way to determine the correct retirement coverage.
- RSM developed the CDA in collaboration with DoD, DOL, OPM, USDA, and Treasury.



The Coverage Determination Application

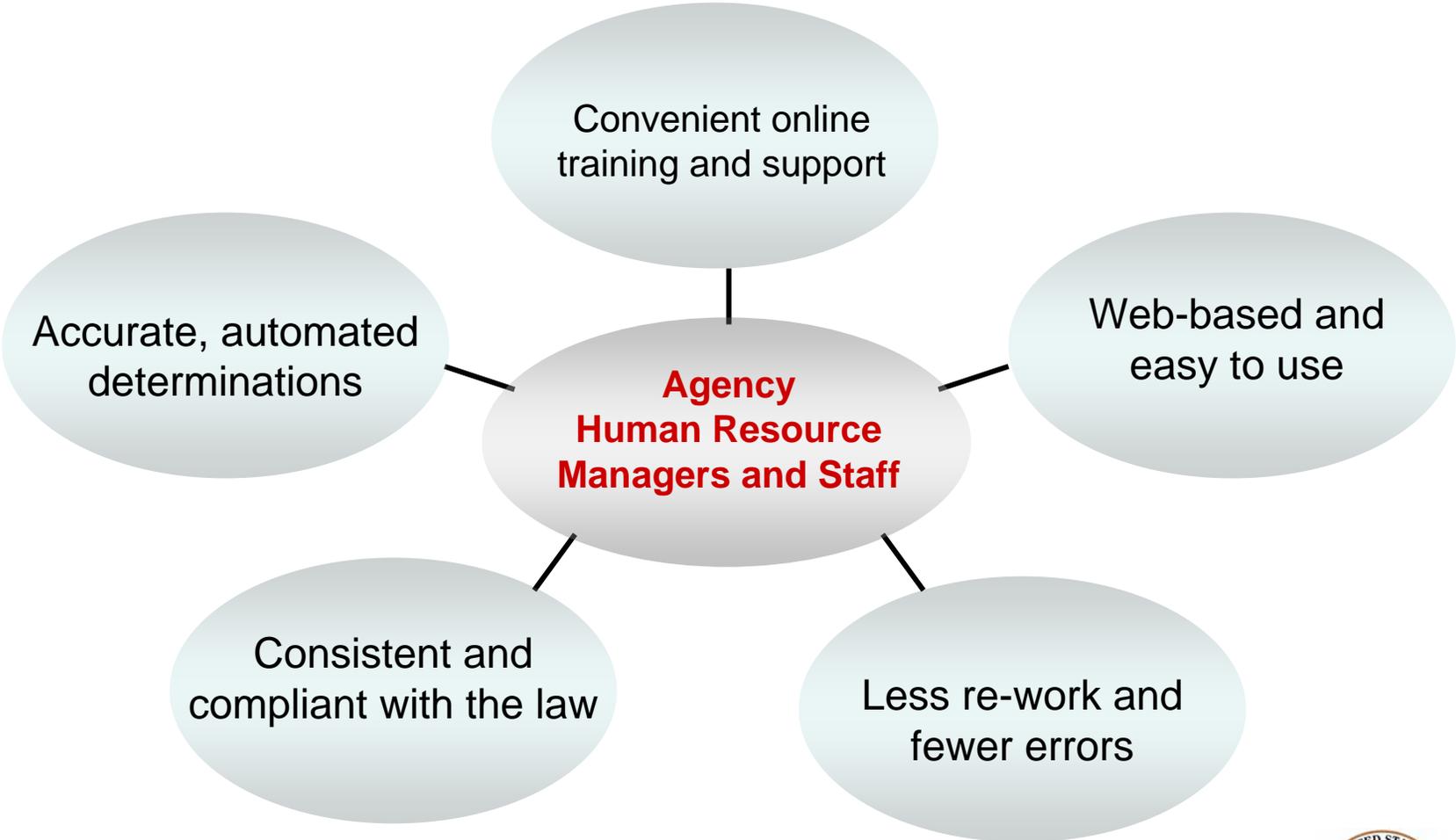
An online tool for Agency HR staff

- **What does the CDA do?**
 - The CDA is an online tool that:
 - Helps HR specialists determine the correct retirement coverage **using a series of automated rules and steps**
 - Captures and accesses employee data
 - Improves the accuracy of coverage determinations
 - Validates prior coverage determinations

***Successful CDA launch to Pilot User Group in Early 2004—
Governmentwide Rollout planned for later this Fall!***



Benefits of the Coverage Determination Application



Coverage Determination Application Pilot Program

Learning from feedback to better serve Agencies

- **How has the Pilot Program benefited the CDA?**
 - Agency users have provided feedback based on real-time usage
 - OPM conducted surveys and focus groups to look at usability, user support, training, and functionality
 - Lessons learned during the pilot will enhance the Governmentwide rollout
- **What has OPM learned from the Pilot Program?**
 - Users enjoy the convenience of an online tool
 - User support is comprehensive and helpful
 - Communication on the CDA release and availability can be improved
 - Expanding the CDA to include more complex determinations will add to the usability



Coverage Determination Application Pilot Program

Improving the Solution

- **What do users have to say?**
 - *“I think this program would be a benefit to new users...If expanded, I believe it will be an excellent program.”*
 - *“...I welcome being a part of this pilot program, and I would like to receive more information so I can be more involved with the CDA.”*
 - *“The program will be even better when you can put more complicated cases in!”*
- **What is OPM doing to further improve the CDA for Governmentwide rollout?**
 - Adding more complex determinations (e.g., reemployed annuitants)
 - Expanding user support
 - Improving online help and training



The Coverage Determination Application Governmentwide Rollout

Coming soon to your agency

- **When can I expect to see the CDA at my agency?**
 - A governmentwide release is set for later this Fall
 - Agency access will be offered in a 'phased' implementation

- **How will staff at my agency know how to access the CDA?**
 - Targeted communications about the governmentwide release, including instructions for accessing the CDA
 - Websites, presentations and demonstrations (similar to this one)

- **What about training and support?**
 - The CDA features:
 - Web-based training for all users
 - Link to activate the training module at any time
 - User support with an online email link, help screens, and telephone assistance and technical support
 - Subject matter experts available for detailed business questions



CDA Demo

Simple to use!

- **Login and Home page**
 - Consistent visual branding
 - Straightforward interface allows for employee searching
- **Navigating the CDA**
 - Intuitive notebook-style 'tab' format allows for easy navigation
 - Employee profile remains on-screen during determination process for referencing
 - Employee data is saved and can be built upon during subsequent use
 - Links to OPM home page
 - Exclusion criteria, Nature of Action (NOA) codes and online help are always displayed to the user



CDA Demo

Easy to learn!

- **Online Training**

- A complete tutorial is only a click away!
- Interactively walks user through the screens and steps in the CDA
- Users learn at their own pace from the comfort of their desk
- Serves as a reference for questions about the CDA

- **User Support**

- **'Contact CDA' link** lets users send email questions directly to the CDA helpdesk
- A **'Help' link** in the CDA displays frequently asked questions and instructions
- **Live telephone support** is also available for technical and administrative questions
- Users can also reference **Web-based Training** module for answers or sample scenarios



CDA Demo

User-friendly and accurate

- **Creating and updating appointments**
 - Add new service appointments easily using familiar web forms and drop-down boxes
 - Users can enter data directly from the OPF
 - Optional and required fields are indicated to help the user
- **Executing coverage determinations**
 - Users can
 - link to view those coverage cases that are unable to be determined in the CDA
 - view the service history and then execute a determination at the click of a button
 - print and save executed determinations
 - recall saved determinations



What's Next?

- **Governmentwide Rollout**
 - The CDA will be released to agencies on a schedule later this Fall in a phased implementation
- **Communications**
 - Look for communications about the CDA to your agency in the coming weeks
- **CDA Enhancements**
 - Future releases of the CDA including enhanced functionality are planned
 - Encourage your staff to share their thoughts on how we can make the CDA better!



Contact Information

**For more information,
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